

## Client Profile

Office of International Development - Indiana Economic Development Corporation  
One North Capitol, Suite 700, Indianapolis, IN 46204 Tel: 317-233-3762 Fax: 317-232-4146

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This profile is designed to provide the Office of International Trade (OIT) with enough information to assist your company in developing its international markets and is intended for research purposes. To effectively serve you, it is necessary that all information requested be provided as well as five (5) copies of your sales literature, a company write-up, and a summary of any market research you may have already conducted. If you need assistance with completing any portion of this form, please contact our office.

Primary Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Secondary Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: IN Zip Code: \_\_\_\_\_ County: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Fax: \_\_\_\_\_

President's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

E-mail Address: \_\_\_\_\_ Web Page: \_\_\_\_\_

Federal Identification Number: \_\_\_\_\_

### Classify Your Business: (check all that apply)

☐ Agent ☐ Manufacturer ☐ Service Provider ☐ Importer ☐ Retailer

☐ Distributor ☐ Wholesaler ☐ Construction ☐ Exporter ☐ Other

(specify)

Number of Employees: \_\_\_\_\_ Year Established: \_\_\_\_\_ Annual Sales: \_\_\_\_\_

SIC Codes: \_\_\_\_\_

### Client Evaluation Checklist: (check appropriate response)

Yes No

#### Resources

- |     |     |  |
|-----|-----|--|
| ___ | ___ | * One person is designated to lead your international market development       |
| ___ | ___ | * Access to working capital has not been a problem                             |
| ___ | ___ | * At least \$5,000 is allocated for international market development this year |

#### Motivation

- |     |     |  |
|-----|-----|--|
| ___ | ___ | * Supplement domestic sales with occasional export sales |
| ___ | ___ | * Benefit by stabilizing seasonal market fluctuations    |
| ___ | ___ | * Contribute to company's long-term expansion            |

#### Commitment

- |     |     |  |
|-----|-----|--|
| ___ | ___ | * Top management is committed to exporting                                     |
| ___ | ___ | * Top management is willing to wait up to 2 years to break even                |
| ___ | ___ | * Exports will continue to be emphasized when domestic business is at its peak |
| ___ | ___ | * Export by filling unsolicited orders only                                    |

#### Product

- |     |     |  |
|-----|-----|--|
| ___ | ___ | * At least 51% of product(s) is of Indiana origin                      |
| ___ | ___ | * Product(s) can be modified to meet foreign requirements if necessary |

\_\_\_    \_\_\_    \* Company product(s) is competitive with foreign-made products due to:

\_\_\_ Technical superiority

\_\_\_ Unique features

\_\_\_ Price

### **Product Lines: (manufactured in Indiana)**

This section must be completed in detail. In order to provide you with accurate export information, it is necessary that you

provide your product's Schedule B Number. If you do not know the correct number, please follow the appropriate steps below.

NOTE: It is difficult to provide thorough market research without these numbers.

### **Schedule B Classification Assistance**

Assistance in classifying products can be obtained in three ways:

- 1) Your freight forwarder may have this number on file,
- 2) Try the U.S. Census Bureau's website to locate your Schedule B number(s):  
<http://www.census.gov/foreign-trade/schedules/b/>
- 3) If you do not have internet access, call the Census Bureau at (301)457-1084.

#### **Product Description**

#### **Schedule B Number**

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

#### **Selling Points**

#### **Correlating Benefits**

1. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### **Export Licensing**

The large majority of all U. S. exports are covered by a "General License", which is automatically granted. However, some

products do require an export license as do shipments to certain countries. To see if your product or shipment is subject to

licensing, contact the Bureau of Export at (202) 482-4811.

### **Product Market:**

**Customer Profiles** (describe end-user in detail)

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U.S. Market Share: \_\_\_\_

Current exports as a percentage of total sales(approximate):\_\_\_\_\_

**Domestic Distribution:** (check current domestic distribution channels)

\_\_\_\_ Agent    \_\_\_\_ U.S. Exporter    \_\_\_\_ Direct Sales    \_\_\_\_ Distributor

\_\_\_\_ Foreign Importer

\_\_\_\_ Other (specify) \_\_\_\_\_

**International Distribution:**

To which foreign countries do you export  
on an ongoing basis?

Distribution  
(Bold)

Exclusive  
(Bold)

_____	direct sale, agent, distributor, JV, license	Y	N
_____	direct sale, agent, distributor, JV, license	Y	N
_____	direct sale, agent, distributor, JV, license	Y	N
_____	direct sale, agent, distributor, JV, license	Y	N
_____	direct sale, agent, distributor, JV, license	Y	N
_____	direct sale, agent, distributor, JV, license	Y	N

**Do you advertise internationally?**

\_\_\_\_ Yes

\_\_\_\_ No

**Do you attend domestic trade shows?**

\_\_\_\_ Yes

\_\_\_\_ No

Which are the most important in your industry?

Show

Location

Frequency

_____	_____	_____
_____	_____	_____
_____	_____	_____

**Do you attend international trade shows?**

\_\_\_\_ Yes

\_\_\_\_ No

Please list the most recent international trade shows that your company has attended.

Show

Country

Year

_____	_____	_____
_____	_____	_____
_____	_____	_____

**Is your firm a member of a trade association?** If yes, please list below (no acronyms please).

\_\_\_\_\_

**In which foreign countries are you most interested?**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Have you researched this market?**

____ Yes	____ No
____ Yes	____ No
____ Yes	____ No
____ Yes	____ No
____ Yes	____ No

\_\_\_\_ Yes

\_\_\_\_ No

**What type of relationship are you seeking?**

\_\_\_\_ Agent

\_\_\_\_ Joint Venture

\_\_\_\_ Direct to OEM

\_\_\_\_ Distributor

\_\_\_\_ License

\_\_\_\_ Other (specify) \_\_\_\_\_

**Describe your ideal foreign trading partner** (e.g. an agent currently handling X, Y and Z lines):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**International Trade Assistance:**

**Have you used the Trade Show Assistance Program (TSAP)?**

\_\_\_\_ Yes

\_\_\_\_ No

If no, would you like to receive information about TSAP?

\_\_\_\_ Yes

\_\_\_\_ No

Are you currently working with: an international attorney?

\_\_\_\_ Yes

\_\_\_\_ No

an international banker?

\_\_\_\_ Yes

\_\_\_\_ No

a freight forwarder?

\_\_\_\_ Yes

\_\_\_\_ No

**Are you familiar with our Trade Finance Program (TFP)?**

\_\_\_\_ Yes

\_\_\_\_ No

If no, would you like to receive information about:

working capital guarantees?

\_\_\_\_ Yes

\_\_\_\_ No

medium & long-term guarantees?

\_\_\_\_ Yes

\_\_\_\_ No

export credit insurance?

\_\_\_\_ Yes

\_\_\_\_ No

Are you familiar with CE mark for products exported to Europe?

\_\_\_\_ Yes

\_\_\_\_ No

Are you certified?

\_\_\_\_ Yes

\_\_\_\_ No

If no, would you like more information on CE marking

\_\_\_\_ Yes

\_\_\_\_ No

**New Service Request Check list:**

Who are the customers in Domestic Market?

\_\_\_\_\_

How do you normally reach target customers in Domestic Market?

\_\_\_\_\_

Who is your competition both U.S.A. and Foreign Markets?

\_\_\_\_\_

What are your objectives of Exporting?

\_\_\_\_\_

\_\_\_\_\_

Who are your Target Customers in the Foreign Market?

\_\_\_\_\_

What information would you like your Foreign Trade Specialist gather for you?

\_\_\_\_\_

If seeking contacts, what kind of contacts would you like?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Important Note:**

When returning this Client Profile, please include:

- 1) Five (5) copies of your sales literature
  - 2) A company write-up (see sample inside)
  - 3) Summary of any international market research you may have already conducted.
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**Would you like to be visited by one of ITD's International Trade Specialists to discuss international trade issues?**

☐ Yes ☐ No

If yes, please call:

**Indiana Economic Development Corporation at 232-8800**